



Report to the Commissioners

Area IX Agency on Aging, Flathead County

February 20, 2018

Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals
FY 2017 annual targets
FY 2017 actuals
FY 2017 actuals as a percentage of annual targets
FY 2017 actuals as a percentage of FY 2016 actuals
FY 2018 actuals to date
FY 2018 annual targets
FY 2018 actuals as a percentage of FY 2018 annual targets

The general target is 58% for FY 2018, July 1, 2017-January 31, 2018, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- **Meals**
 - Total meals served continue to be above target for this fiscal year and on pace with actuals for last fiscal year.
- **Transportation**
 - Rides are 10% above target for the year at 68% due to the addition of the GNP commuter during the summer season and a 7% increase in Dial-A-Ride rides over this time last year.
 - Overall rides for the month are up by 881 over January of last year.
 - Excluding the GNP commuter, rides for the year are down 1.8% from this time last year.
 - Fixed route rides, without the addition of the GNP commuter, lag 19% due to a substantial decrease in Kalispell city bus rides (mostly on the PM route). However, rides for the Kalispell route (AM and PM) were up from last month and represent the highest one month total this fiscal year.
 - Current planning efforts are focused on restructuring Kalispell routes.
- **Information/Referral and Assistance**
 - We continue to experience a high volume of client calls and requests for assistance. Recent increases appear to be driven by state funding cuts to other services and providers, especially

the local DPHHS Offices of Public Assistance. Older adults and people with disabilities are being redirected to our offices. However, we are limited in our ability to provide the help they need because we don't have access to OPA information. We are working with DPHHS to resolve this issue. We are further limited by the size of our staff and by our own anticipated state funding cuts.

▪ **Independent Living Services**

- We continue to be approximately 10 % below target for the number of people served and the number of units of service provided for the year. However, we have resolved our client enrollment issues.
- Although we are below target for the year, we have put a temporary hold on new enrollments pending more information on state budget cuts for the remainder of FY 2018 and FY 2019. We are anticipating a 5-10% cut.

AOA Administration

Budget and Contracts

- DPHHS informed all Area Agencies on Aging we will receive a 5-10% cut in state funds remaining for FY 2018 and for all of FY 2019. We anticipate knowing more detail by the end of March.
- We are almost ready to begin serving veterans through the Veteran-Directed Home and Community-based Services (VDHCBS) program. The program is funded by the VA, and we will implement it in partnership with the Area VI Agency on Aging. The VA Provider Agreement and MOA with Area VI have been reviewed by Tara and will be on your agenda shortly.
 - The program provides a monthly allowance to veterans to purchase attendant care and other services they need to stay in their homes and communities. To be eligible, veterans must have been honorably discharged and meet functional need requirements. Initially, Area VI staff will provide VDHCBS services to eligible Flathead County veterans and pay us a monthly fee per enrolled veteran. We will take over service provision at some point in the future when there are enough veterans enrolled to support staff and operational costs.

State/Federal/Legislative Issues

- Lisa participated in an M4A conference call in February.
- Federally, we continue to monitor progress on the budget and advocate for funding for aging services. Although Congress recently agreed to an increase in discretionary domestic spending, it is not yet clear what programs will be funded and at what level. The SHIP program which supports us to provide Medicare and benefits counseling continues to be in jeopardy. In addition, the President's budget calls for drastic reductions and/or elimination of a number of programs that help older adults, including LIHEAP (low income energy assistance) and CDBG. The future of Medicaid, which is the single largest payer of long-term care services for older adults and people with disabilities, is also uncertain.

Building

- Punch list update:
 - Mike Pence, Jed Fisher, Mike Hovila and Lisa met last week to review outstanding items and complete a walk through.
 - The drywall cracks in the dining room that were repaired have reappeared. The paint job on the repaired cracks in the lobby ceiling is unacceptable.

- The small kitchen freezer has been working well for several weeks and the icing problem in both freezers has improved significantly. However, given the history of failed repairs we won't consider the problems fixed until 60 days have passed with no service calls.
- We plan to monitor the temperature in the dry storage area in the summer as modifications were made too late in the season to know if they were effective in reducing temperatures.

AOA Advisory Council

- The Advisory Council did not meet in February. The next meeting will be held March 8, 2018, according to the bimonthly schedule.

Other

- We continue to work on the Continuity of Operations Plan (COOP).

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 1/2/18, monthly KGEZ interview, 11,000
- 1/6-9/18, notice for AOA Council meeting in Daily Inter Lake Daybook, on county calendar and AOA webpage, 17,000
- 1/10/18, presentation to Evergreen Rotary, 14
- 1/9/18, presentation on BEC and AOA services at Community Management Team meeting, 16 participants
- 1/20-23/18, promotion of Medicare 101 class, including in DIL Daybook, 17,000
- 1/23/18, presented Medicare 101 class at South Campus, 25
- 1/24/18, AOA newsletter, 350 hard copies distributed and posted on AOA webpage
- 1/24/18, Event to assist seniors with 2EC filing (homeowner/renter tax credit) at Centre Court and The Elms senior housing complexes, 15 people assisted
- 1/25/18, information table at Winter Warm-Up event at Gateway Community Center, 300
- 1/28/18, ad in the annual United Way Answer Book, 27,000
- 1/30/18, article on AOA 2EC assistance in the Whitefish Community Center newsletter, 300
- 1/31/18, staff interviewed for Flathead Beacon article, "Montanans on Medicaid Face Cut to Dental Services in 2018," 17,000

Age-Friendly Flathead

- The Steering Committee held its monthly meeting on 1/18/18 at the South Campus.
- AARP Montana facilitated a Direct Action Organization for the Steering Committee on 2/17/18 to help us develop a workplan for moving forward.
- The next step will be to submit a letter (sponsored by local government) to AARP to begin the 5-year livable community process, which is based on local concerns and interests.

Eagle Transit

- Montana Department of Transportation (MDT):
 - 5-Year Transportation Development Planning Grant
 - The Planning Committee met on 2/1/2018. The next meeting is set for March 27, 2018.
 - The Committee will present draft recommendations to the Transportation Advisory Committee on April 5, 2018 with stakeholder and public meetings to follow.
 - We anticipate a completed plan and roll-out of initial changes by July 1, 2018.

- FY 2019 Transportation Coordination Plan, 5311 Application and Capital Request
 - The final TCP, 5311 Application and Capital Request were presented to Commissioners today.
 - All required documents will be submitted via the MDT website by March 1, 2018.
- The second quarter program and financial reports were submitted in January. A financial desk review was completed in February.
- Outreach/Education/Media/Special Events:
 - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake on 1/17/18.
 - 1/3-4/18, promotion of 1/4/18 TAC meeting in Daily Inter Lake, 17,000
 - 1/8/18, Daily Inter Lake article, "Constant planning keeps bus system rolling," 17,000
 - 1/9/18, Daily Inter Lake article, "State compromises on bus-shelter advertising rules," 17,000
 - 1/10/18, presentation to Evergreen Rotary, 14 in attendance
 - 1/31-2/1/18, promotion of 2/1/18 TAC meeting in Daily Inter Lake, 17,000
 - 1/28/18, ad in the annual United Way Answer Book, 27,000
- Operations:
 - Although we have significantly reduced overtime expenditures, we continue to rely heavily on contracted employees to fill shifts due to drivers on extended leave.
 - Onboard cameras approved as part of our FY 2017 capital request are being installed this week.
 - The new 27 passenger bus that was approved as part of our FY 2017 capital request will arrive by the end of the month.
 - We are in discussions with the Kalispell school district and Parks and Rec Dept. regarding potential public transportation to after school programming similar to our SPARKS route/arrangement.
 - Recent improvements in operations include 100% on-time vehicle maintenance and processing of new Dial-A-Ride applications within one week,
- Transportation Advisory Committee (TAC)
 - The Committee met on 2/1/18 to review and vote on the final TCP, the 5311 application and the capital request.
 - The next meeting will be April 5, 2018.
- Glacier National Park
 - We have identified two options to dispose of the 6 Optima buses.
 - MDT is in the process of releasing ownership of the buses to Flathead County.

Nutrition

- We are planning a joint volunteer appreciation luncheon/event with the Kalispell Senior Center on Saturday, March 17th. Invitations will go out shortly.
- Nutrition Manager J.R. Isles is in the process of completing annual site assessments at the area senior centers/meal sites.
- The annual survey will go out in March.

I & R/Assistance/Ombudsman

- As part of the new BEC grant, we are working with IT to create a new website for AOA.
- Monthly Medicare 101 classes are offered the 4th Tuesday of each month from 1:00-3:00 pm.

- Staff are taking in-office appointments and holding events at area senior centers and senior housing complexes to assist older adults to apply for the homeowner/renter tax credit (2ECs).
- Staff are looking at ways to streamline the client assistance/counseling process in light of the increase in calls, walk-ins and appointments.
- The annual survey will go out in March.

RSVP

- Grant update: The final FFR is due. We still cannot access the federal online system.
- Lisa contacted the state RSVP office again in January for assistance with this issue. The state office staff again contacted the national CNCS office, but no resolution to date.

Senior Mobile Home Repair

- The Advisory Board met on 2/14/17.
- Six (6) projects were completed; 23 are in progress.
- There are many people requesting roof repairs/replacements. Replacements are prohibitively expensive, so most approvals are for patches only.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- We have met with all area senior center boards to update annual agreements. The meal site agreement with the Lakeside Chapel is still pending.
- We continue to look at options for a new building for the Bigfork Community Center.
- The Kalispell Senior Center is planning to host its second annual Tea Party in May.
- The North Valley Senior Center is making additional improvements to the Center, including new flooring and paint and enclosing the side ramp into the building.

February 2018 Report: Performance Measures Tables -January 2018 stats (FY 2018)

58.00%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	Jan	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	not yet available	88	88	233	38%
# Receiving Meals on Wheels	471	450	470	104%	100%	20	294	314	465	68%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	57	1,010	1,067	1,000	107%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	16	273	289	500	58%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	90%	90%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$5.90	\$5.92	\$5.90	\$6.75	87%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL-96%	100%	100%	N/A	0%	N/A	95%	100%
Maximum annual number of transportation complaints	27	36	30	83%	111%	2	4	6	36	17%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
Outreach/Education/Media						Jan				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	12	59	71	120	59%
Nutrition						Jan				
Total Meals	78,541	82,000	82,428	101%	105%	7,041	40,777	47,818	79,000	61%
MOW	49,283		49,695	N/A	N/A	4,212	23,908	28,120		
Congregate	29,258		32,733	N/A	N/A	2,829	16,869	19,698		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	110	1106	1,216	1,550	78%
Transportation						Jan				
Total Ride Count	91,196	94,000	85,305	91%	94%	8,009	53,057	61,066	90,000	68%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,711	15,435	18,146	30,000	60%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	5,298	37,622	42,920	60,000	72%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	8	16	24	15	160%
Information and Referral/Assistance						Jan				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,488	9,643	11,131	18,000	62%
Independent Living			38%			Dec				40%
Homemaker Units of Service	1,616	3,333	784	24%	49%	168	577	745	2,500	30%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	225	654	879	1,739	51%
Respite Units of Service	2,600	3,315	992	30%	38%	211	848	1,059	2,468	43%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	72	563	635	1,353	47%
Personal Care Units of Service	1,150	465	358	77%	31%	17	84	101	435	23%
Benefits Counseling						Jan				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	30	324	354	450	79%
Ombudsman						Jan				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	85	576	661	1,100	60%